



“Training for Financial Aid Professionals” **Training Plan for Spring Training**

Contents

CONTENTS	1
1 EXECUTIVE SUMMARY	2
2 SCOPE	3
2.1 TARGET AUDIENCE	3
2.2 SCOPE	3
2.3 LEARNING OBJECTIVES	4
2.4 FSA UNIVERSITY TRAINING PROCESS	5
3 TRAINING DEVELOPMENT AND DELIVERY	6
3.1 DELIVERY STRATEGY	6
3.2 INSTRUCTIONAL STRATEGY	6
3.3 LOGISTICS STRATEGY	6
3.4 EVALUATION STRATEGY	7
4 PROJECT MANAGEMENT	8
4.1 ROLES AND RESPONSIBILITIES	8
4.2 WORKPLAN.....	9
4.3 COMMUNICATION PLAN	9
4.4 STATUS REPORTING	9
4.5 PROJECT BUDGET	9



1 Executive Summary

This training plan provides a high-level implementation approach for the development of the "Spring Training: 2004 Delivery System Update/Processing Student Level Data" course. The contents of this training plan include:

- An overview of the FSA University training process
- An outline of parameters and assumptions made to date regarding course development, and
- A framework for project management.

Scope

FSA offers Spring Training annually to provide financial aid administrators (FAAs) with timely instruction on recent system updates which impact processing of financial aid. High-level learning objectives for this course have been developed and detailed learning objectives remain to be created by the Spring Training 2004 team. These objectives will be used to define content scope and will drive the design and development of course materials.

This two-day course will be delivered to participants as close as possible to the point of need. Prior to the delivery of Spring Training 2004, FSA will notify FAAs of the pending system updates through two communication vehicles. FAAs will receive written notification of the system updates in the form of a "Dear Colleague" letter, as well as have the opportunity to attend a Videoconference (October 2003). Materials from both the "Dear Colleague" letter and the October system updates Videoconference will be used to develop the content outline for this course.

Process

The existing FSA University Training Process will be followed to develop this course. This process includes 5 key phases: plan, design, build, deliver, assess and ongoing project management. Project management consists of workplanning, communication planning, reviewing team status reports, and managing the project budget.

Target Audience

The target audience for Spring Training 2004 consists of FAAs from schools who administer Title IV funds. These individuals perform the following roles: business officers, auditors, accounting personnel and system technicians.

Delivery

Delivery methods will include instructor-led classroom-based training and virtual classroom training. While instructor-led training is the delivery method preferred by FAAs, virtual classroom training will provide an alternative for FAAs with time and/or cost constraints.

The first day of training will consist mainly of lectures with demonstrations to cover delivery system updates. Content for the second day of Spring Training 2004 must be defined prior to determining the appropriate instructional strategy.

Given that the audience is geographically dispersed, training will be delivered at regional training facilities (RTFs). Depending on cost and/or availability, additional cities may be used to host this course. Additional locations include hotels and school facilities.

Trainers will be selected from a pool of existing FSA training officers (TOs) and Client Account Managers (CAMs). In the event that additional trainers are required, non-federal trainers will be identified. A few trainers will be designated for the virtual delivery of this course and will require training in the virtual classroom product.

Logistics planning and support will be necessary throughout all phases of training development and delivery. This includes securing sites, equipment, and materials; registering participants; and shipping and mailing training materials to the training site. Logistics coordinators from FSA and the contractor will share responsibilities for managing logistics.

Evaluation

The effectiveness of the course will be evaluated throughout development and delivery to ensure that learning objectives are met. Evaluation tools include pilot sessions to test training modules and course evaluations to gather feedback on training events. Data from these evaluations will be compiled and synthesized by the contractor who will then provide the Project Manager with a final report.



“Training for Financial Aid Professionals” Training Plan for Spring Training

2 Scope

2.1 Target Audience

The target audience for Spring Training 2004 consists of FAAs from schools who administer Title IV funds and who are located across a geographically dispersed area. Specifically, this audience includes FAAs performing the following roles at university financial aid offices: business officers, auditors, accounting personnel and system technicians.

Typically FSA conducts a total of 55 training sessions across the United States. Each session is usually limited to 60 participants. Attendance data from Spring Training 2003 and Cash Management 2003 will be used to further estimate attendance and audience demographics and determine session offerings for Spring Training 2004.

2.2 Scope

FSA offers Spring Training annually to provide FAAs with timely instruction on recent system updates which impact processing of financial aid and to cover topics in student eligibility.

The conceptual design for this course is based on feedback from FAAs, data from the Application Processing Staff and the results of the 2003 Training Needs Assessment Survey conducted by the FSA training needs assessment team. According to survey data the most requested topics by FAAs include Common Origination and Disbursement (COD), National Student Loan Data System (NSLDS), and Return of Title IV Funds (R2T4). Information gathered from the Application Processing staff was analyzed to determine additional training needs which will result from delivery system changes. The advent of the ISIR Data Mart in 2004-05, changes to the FAA Access website, and development of web tools will result in a need for training to ensure that FAAs understand these changes. In the evaluations from Spring Training 2003, FAAs indicated that student eligibility topics should continue to be covered in Spring Training 2004, but that FAAs would prefer more advanced coverage of these topics.

Spring Training 2004 will consist of two days of classroom-based, instructor-led training which will be delivered at the end of January 2004. The table below outlines the tentative agenda for topics to be covered. Content scope requires further definition. Content scope and the appropriate level of detail will be specified by the training team following the project kick-off meeting.

Day		Topics
	Delivery System Updates	Processing Student Level Data
Day One	Half-day of training to include: <ul style="list-style-type: none">▪ COD▪ FAA Access▪ Web Tools▪ ISIR Data Mart	Half-day of training to include advanced TBD topics in /student eligibility.
Day Two	N/A	Advanced topics in Student Eligibility (continued): <ul style="list-style-type: none">▪ COD<ul style="list-style-type: none">• POP (potential overpayments)• Transfer students▪ NSLDS<ul style="list-style-type: none">• Annual/aggregate loan issues• Impact of consolidation loans• Student withdrawal issues▪ R2T4▪ PJ▪ Verification▪ Conflicting information



2.3 Learning Objectives

Learning objectives define what participants will be able to know or do at the end of a course. Detailed learning objectives will further define content scope and will drive the design and development of course materials. At the end of training delivery, the course evaluation will measure the effectiveness of the training against the original learning objectives.

High-level learning objectives for Spring Training 2004 are listed below.

- Identify and describe application changes
- Identify and describe application processing changes (CPS changes)
- Review methods for accessing, receiving, and reviewing applicant data
- Review methods for correcting applicant data
- Identify COD changes for 2004-05 (Calendar year)
- Identify the steps in determining student eligibility
- Identify and demonstrate the use of NSLDS in determining student eligibility
- Define and demonstrate the use of professional judgement
- Define and explain the verification process and how it is different than conflicting information
- Calculate an R2T4

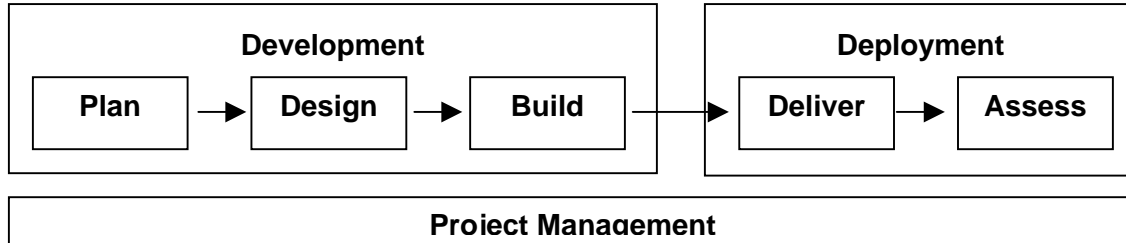
Detailed learning objectives require further definition following project kickoff.



“Training for Financial Aid Professionals” Training Plan for Spring Training

2.4 FSA University Training Process

The existing FSA University Training Process will be followed to develop Spring Training 2004. The process lifecycle consists of 5 key phases supported by ongoing project management. A soft copy of the process materials can be obtained from Pennie Summers.



Development

Plan

During the planning phase, the project team outlines the requirements for course development and delivery. The purpose is to set a realistic timeframe for the completion of the project, establish milestones for course development, and anticipate future needs. The Project Manager is responsible for planning and determines high-level course scope, defines a team structure, sets project benchmarks, and builds a communication plan to keep stakeholders and sponsors informed of progress. In addition, the Project Manager is responsible for facilitating the project kickoff meeting.

Design

During the design phase, the Spring Training 2004 team will develop course outlines and begin designing content and delivery mechanisms for the course. This phase is critical because it allows review and revision of proposed materials by subject matter experts, sponsors and other key stakeholders. The train-the-trainer (TOT) course outlines, instructor guides, participant guides, and course activities will need to be designed. The content development team will use storyboards as the primary vehicle for depicting and organizing the course outline and instructional strategies. The content of the course will be reviewed and approved by stakeholders and sponsors. In addition, the team will create an outline for the evaluation strategy of course materials.

Build

The content development team develops all course materials during the build phase. This includes detailed course content, instructor guides, participant materials, and training of trainers course materials. During this phase, a dry run of the course is conducted to ensure that course materials flow, utilize appropriate instructional strategies, and are at the appropriate level of detail for the audience.

Deployment

Deliver

The delivery phase will include the facilitation of a pilot session, a TOT course, and the final delivery of Spring Training 2004 sessions. The pilot sessions are specially designed to solicit feedback from a sample audience and to evaluate the effectiveness of the instructional strategies. Feedback is used to refine the final product. Following the pilot, training of trainer sessions will be held to prepare trainers for course delivery. During implementation, courses are delivered to FAAs in designated locations.

Assess

Training will be reviewed throughout development to ensure accuracy, content appropriateness, and continuing sponsorship of materials.

Project Management

Project management involves the development and ongoing implementation of a workplan and a communication plan. Project management is described in detail in section 4.0 of this document.



3 Training Development and Delivery

3.1 Delivery Strategy

Spring Training 2004 will be delivered to participants in two ways: instructor-led classroom-based training and virtual classroom training. The majority of the offerings will be classroom-based instructor-led. According to the Training Needs Assessment Survey this is the preferred training method of the target audience. In addition, virtual training will be used by technology proficient schools and will provide cost savings by eliminating the need for travel. By downloading the virtual classroom software to their workstations, participants will be able to work virtually with an instructor.

Given that the audience is geographically dispersed, training will be delivered at regional training facilities (RTFs) in the following cities:

- Atlanta
- Boston
- Chicago
- Dallas
- Denver
- Kansas City
- New York
- Philadelphia
- San Francisco
- Seattle.

Typically, depending on cost and/or availability, additional cities are used to host this course and locations include a combination of hotels and schools. Attendance data from Spring Training 2003 and Cash Management 2003 will be used to determine further training locations.

Trainers will be selected from a pool of existing FSA training officers (TOs) and Client Account Managers (CAMs). In the event that additional trainers are required, then non-federal trainers will be identified. A few trainers will be designated for the virtual delivery of this course and will require training in the virtual classroom product.

3.2 Instructional Strategy

The instructional strategy is a method for presenting content. It is important to select the appropriate instructional strategy so that content is easily understood and mastered by participants. For Spring Training 2004, the following factors will influence the selected instructional strategies:

- Needs/type of audience
- Preferred instructional strategies
- Availability of technology
- Type of content being taught
- Cost.

The first day of training will consist mainly of lectures with demonstrations to communicate upcoming system changes. Content for the second day of Spring Training 2004 must be defined prior to determining the instructional strategy.

3.3 Logistics Strategy

Logistics planning and support is necessary throughout all phases of training development and delivery to ensure timely and seamless implementation of the course. Logistics planning includes securing sites, equipment, and materials; registering participants; and shipping and mailing training materials to the training site. The Learning Management System will be used to register participants to the course. Logistics coordinators from FSA and the contractor will share responsibilities for coordinating logistics.

Technical assistance will be required for delivery and will include support for the virtual classroom portion of the course.



"Training for Financial Aid Professionals" **Training Plan for Spring Training**

3.4 Evaluation Strategy

The effectiveness of the course will be evaluated throughout development and delivery to ensure that learning objectives are met. Evaluation tools include a pilot course to test training modules and course evaluations to gather feedback on training sessions. Feedback from pilot sessions will be used to evaluate whether course modules are the appropriate length and convey ample detail. FSA University uses a standard course evaluation to gather feedback on all training events. This standard evaluation will be supplemented to obtain specific feedback on Spring Training 2004 course content. Data from these evaluations will be compiled and synthesized by the contractor who will then provide the Project Manager with a final report.



4 Project Management

4.1 Roles and Responsibilities

Establishing roles and responsibilities provides team members with an understanding of what is expected of them and helps the Project Manager select team members who best fit the required roles. During the project kickoff meeting, the Project Manager will assign roles and responsibilities to team members.

The Spring Training 2004 team will consist of 4 sub-teams: Leadership, Content Development, Support and Delivery. The Leadership Team is responsible for setting direction, overseeing progress of course development and delivery, and coordinating the efforts of the other three teams. The Content Development Team will design and build course materials. The Support Team is responsible for managing the task order award and coordinating logistics and communications. The Delivery Team will provide training. A high-level overview of the Role Map for this course is depicted in the table below. Detailed roles and responsibilities are provided in the following document: Role Map_09192003.doc.

	Role	Responsibilities	Who/How Many
Leadership Team	Project Sponsor	<ul style="list-style-type: none">• Sets strategic direction	Bill Ryan (FSA) Kay Jacks (FSA) Midge Hunt (FSA)
	Project Manager/Team Lead	<ul style="list-style-type: none">• Oversees project and monitor work	Jo Ann Borel (FSA)
	Contractor Program Manager	<ul style="list-style-type: none">• Sets strategic direction for content development team	TBD (Contractor)
Content Development Team	Lead Instructional Designer	<ul style="list-style-type: none">• Translates teams vision, objectives, ideas into draft course material	TBD (Contractor)
	Development Subject Matter Expert (SME)	<ul style="list-style-type: none">• Provides content to project team	TBD (FSA)
	Contractor Development Team	<ul style="list-style-type: none">• Plans, designs, builds the training course	TBD (Contractor)
	Training Officers	<ul style="list-style-type: none">• Assists in delivering and assessing the trainer/training materials and help/support processes	TBD (FSA)
Support Team	COR	<ul style="list-style-type: none">• Executes and monitors task order	Pennie Summers (FSA)
	Contractor Logistics Coordinator	<ul style="list-style-type: none">• Plans and executes logistics	TBD (Contractor)
	FSA Communications & Logistics Coordinator	<ul style="list-style-type: none">• Assist s Project Manager in planning and executing logistics strategy	Beverly Cooper (FSA)
Delivery Team	Trainers	<ul style="list-style-type: none">• Delivers training	TBD (Federal and Non-Federal)
	Technical Advisor	<ul style="list-style-type: none">• Provides support for WebEx product	TBD
	Review SMEs	<ul style="list-style-type: none">• Reviews materials and provide input throughout development of course	TBD (FSA)
	Pilot Audience	<ul style="list-style-type: none">• Participates in pilot tests	TBD (FSA)



“Training for Financial Aid Professionals” Training Plan for Spring Training

4.2 Workplan

Workplanning outlines the scope of an effort and communicates expectations of deadlines with sponsors and team members. A workplan for Spring Training 2004 will assist the training team in successfully developing this course within an aggressive timeframe. The Project Manager will monitor the workplan which will be adjusted as necessary to accommodate changes in direction and unforeseen developments.

High-level milestones for the development of Spring Training 2004 include:

Milestone	Timing
Kickoff Meeting	Early October 2003
Course Development	October/November 2003
Pilot	Early December 2003
Training of Trainers	Early January 2004
Course Go-Live	End of January 2004
Conduct Course	February/March 2004
Final Summary Report	April 2004

Project milestones have taken into consideration school holidays and Electronic Access Conferences (November and December 2003) which will be heavily attended by FAAs and FSA employees. In addition, the schools' academic calendar ends in mid-December and FAAs will not be available to participate in training at this time.

4.3 Communication Plan

Communication planning is a process that ensures key messages are effectively conveyed to appropriate audiences. Two communication plans will be developed to serve the internal and external communication needs of this project. The Project Manager will oversee the development of these plans and will ensure they are executed in a timely manner.

An internal communications plan will keep all stakeholders informed of the progress of Spring Training 2004. Vehicles for this plan will include meetings, conference calls, status reports, presentations, and other methods commonly used by FSA.

An external communication plan will advertise Spring Training 2004 to FAAs via listserv announcements, postings to the FSA learning management system, and postings to the Training for Financial Aid Professionals (TFAP) website.

4.4 Status Reporting

Status reports will be used by the Project Manager to track activities and progress against the team workplan. It also provides the opportunity for team members to identify risks and issues. Additionally, status reporting serves as a communication tool to share updates with sponsors and stakeholders.

The existing FSA University template will be used by the team to provide status. Each team lead will be responsible for preparing a weekly report which will be reviewed by the project manager and used to communicate progress and issues to project leadership. This template can be obtained from Pennie Summers.

4.5 Project budget

Responsibility for managing the Spring Training 2004 budget will be shared between the Project Manager and Contracting Officers Representative (COR). The COR will monitor the execution of the task order, collect and analyze actual training cost data, and regularly report budget status and issues to the Project Manager. Together, the Project Manager and the COR will monitor expenditures against the proposed budget and will determine the budgetary implications of course design decisions to the Project Sponsor and team. All expenditures made by the Spring Training team will require pre-approval by the Project Manager.